

**DRAWINGS:**

Please amend FIG. 2 as follows: The 4 sheets of Figure 2 are now to be FIG. 2A, FIG. 2B, FIG. 2C AND FIG. 2D, respectively.

Please amend FIG. 3 as follows: The 4 sheets of Figure 3 are now to be FIG. 3A, FIG. 3B, FIG. 3C and FIG. 3D, respectively. Per the currently amended FIG. 3, include a "254" number label for the element which reads "Total BANT score: (determines lead priority and distribution)" located between element 252 and element 256 on the lead management form. (This line was on the lead management form in the original application, but it was inadvertently not numbered in subsequent applications.)

**REMARKS:**

Claims 1-20 are in the case. Attached is a clean version of the changes made to the claims by the current response. The attached pages are captioned "Clean Version Incorporating Changes Made".

The application has been carefully and thoroughly reviewed in light of the Patent Office Action. Amendments have been made to clarify and correct the rejections under 35 USC 112, 35 USC 102 AND 35 USC 103.

The drawings were objected to by the Examiner. The drawings have been amended as suggested. The 4 sheets of Figure 2 have been changed to FIG. 2A, FIG. 2B, FIG. 2C AND FIG. 2D, respectively. The 4 sheets of Figure 3 have been changed to FIG. 3A, FIG. 3B, FIG. 3C and FIG. 3D, respectively. The specification has been amended to conform to the changes in the drawings. The drawing FIG. 3 has been amended to include a previously omitted "254" number label for the element which reads "Total BANT score: (determines lead priority and distribution)" located between element 252 and element 256 on the lead management form. The specification references an element 254 in paragraphs [0026] and [0032]. Enclosed are 8 sheets of corrected formal drawings.

Claims 2, 3, 12, 14 and 17 were objected to because of certain informalities. Claims 2, 3, 12, 14 and 17 have been amended as suggested.

Claims 1 through 15 and 20 are rejected under 35 U.S.C. §112, second paragraph, as being indefinite for failing to particularly point out and distinctly claim the subject matter which applicant regards the invention. Specifically in claims 1-20, the Examiner stated that it was not clear if Applicant intended to invoke means-plus-function limitations. Applicant intends claims 1-20 to invoke the means-plus-function limitations under 35 U.S.C. §112, 6<sup>th</sup> paragraph. Applicant respectfully disagrees that claims 1 through 20, when interpreted as means-plus-functions claims are in any way vague and indefinite in nature.

MPEP §2106(V)(A)(2) on page 2100-19 states that if the corresponding structure is disclosed to be a memory or logic circuit that has been configured in some manner to perform that function (e.g. using a defined computer program), the application has disclosed "structure" which corresponds to the claimed means. Applicant respectfully submits that the corresponding structure to the means-plus-function clauses is disclosed as a computer program and therefore provides adequate support for the means-plus-function clauses. In paragraph [0005] of the specification and in FIG. 1, Applicant states that the present invention is a web-based system that operates via both the Internet and a corporate intranet. One skilled in the art of web-based systems and databases would know that a defined computer program is used to perform the functions described in Applicant's invention as claimed.

Specific support for the means-plus-function clauses can be found as follows in the previously presented claims (Note: these claims are currently amended):

- a means for acquiring customer lead information from a customer lead  
Paragraphs [0005] and [0011] through [0019]  
FIG. 1, elements 12, 14, 16, 18 and paragraphs [0011] and [0012]  
FIG. 1, elements 20, 22, 24, 26, 28, 30 and paragraphs [0013] through [0019]
- a means for inputting the acquired customer lead information into the customer lead information database via at least one of an intranet and internet  
FIG. 1, elements 34, 44 and paragraphs [0034] and [0035]  
Also, one of ordinary skill in the art of database systems would understand the necessary structure to implement this means-plus-function
- a means for determining a customer lead priority based on information in the customer lead profile record  
Paragraphs [0021] through [0026] and paragraphs [0032] and [0035]
- a means for adding the customer lead priority to the customer lead profile record

FIG. 1, elements 34, 44 and paragraphs [0034] and [0035]

Also, one of ordinary skill in the art of database systems would understand the necessary structure to implement this means-plus-function

- a means for storing the customer lead profile record in the customer lead information database

FIG. 1, elements 34, 44 and paragraph [0012] and paragraphs [0034] and [0035]

Also, one of ordinary skill in the art of database systems would understand the necessary structure to implement this means-plus-function

- a means for distributing, via at least one of an intranet and an internet, an updated customer lead profile record

FIG. 1, element 46 and paragraph [0036]

- a means for automatically notifying at least one designated person when selected portions of a selected customer lead profile changes

Paragraphs [0032] and [0033] and [0036]

- a means for responding to information requests from the customer lead.

Paragraphs [0006] and [0011]

In claim 4 and claim 12, the Examiner stated that a form *per se* does not constitute valid structure. Claims 4 and 12 have been amended to define the “means for acquiring customer lead information” as “one of means for electronically presenting a customer needs feedback form to a customer lead and means for presenting a lead management form to a company representative.”

Claim 20 was incorrectly dependent from claim 12. Claim 20 has been amended to depend from claim 16.

It must be duly noted that the Applicant's invention in no way teaches a one-way or unidirectional use of the Internet to *statically gather* or *upload* customer sales lead data to a customer lead management database—as is taught by the body of prior art cited by the Examiner, but rather teaches the *dynamic and interactive* use of intranet and internet web pages to *immediately assess and respond* to the business needs of

customer sales leads *in real-time*. This fact is plainly, manifestly, and repeatedly evident within the original specification of the Applicant's invention as follows:

1. Paragraph [0011] teaches that "Once the customer lead 12 accesses the company's web site 14, the customer lead 12 proceeds to *view* various marketing promotions that the business has created. Upon *selecting* a desired marketing promotion, the customer lead 12 has two main methods in which he can *request* additional information regarding the desired product or service." This paragraph goes on to state that "the second method a customer lead 12 can use to *respond* to a business's marketing promotion is to *fill out* a customer needs/feedback form 18... *linked to* the promotional marketing offer, located on the company's corporate (Internet) web site 14."

2. Paragraph [0012] teaches that the questions on the Customer Needs/Feedback form 18 "can be integrated into the company/seller's existing internet web site 14 and linked to the seller's Lead Management Intranet site 22 (See 34 in FIG 1)," such that after the customer lead has entered all "Marketing Information" and "Needs/Solutions Information" the system "*prompts* the customer lead 12 with a series of *targeted* questions 104 that allow the customer lead management system 10 to *compute* a solution to the customer lead's 12 problem." These targeted questions interactively request information from the customer lead as outlined in the "INTERACTIVE SOLUTION" section of the Customer Needs/Feedback web form presented in FIG. 2B. Paragraph [0012] then teaches that the system can "*compute* a monetary amount 106 that the customer lead 12 may be losing by not employing the company's goods or services." The results of this *real time computation* can be presented in a *dynamic* pop-up window similar to the example presented in FIG. 2B which provides a customized message 106 that states: "Based upon the information you have just provided us, it is estimated that without any fraud protection system installed, you could be losing as much as \$XX million dollars per year. May we suggest you visit our Wireless Fraud Management System Demonstration located here in the booth."

Paragraph [0012] further states that the Customer Needs/Feedback web form will select an ***“optimized”*** solution to the customer lead’s 12 problem,” at which point the customer leads management system ***“lists”*** a range of potential product/service solutions that the customer lead 12 may be interested in.” This paragraph goes on to state that the customer lead is then ***“prompted to select”*** the goods or services that it desires to ***view*** 108,” and that the customer lead is also ***“prompted to provide”*** an explanation 108a of what the ***selected*** products/services do for him.” Furthermore, this paragraph teaches that the Customer Needs/Feedback web form “provides the customer lead 12 with the ***ability to comment*** on the company’s products and services,” as reviewed by him or her on the interactive web site, and then states that the Customer Needs/Feedback form “provides the customer lead 12 with ***a series of options*** 112 that allows the customer lead 12 to ***choose a particular course of action*** regarding the business’s goods and services.” Paragraph [0012] then concludes by teaching that these options 112, ***interactively*** allow the customer lead 12 to:

- ***“ask the company questions”*** regarding its offered goods and services 118,” such that if this option is ***selected*** “a company representative 20 is ***automatically notified*** with the customer lead’s request via e-mail or by a ***pop-up window*** via the Lead Management Intranet 22”; or to,
- ***“request detailed information”*** or brochures 116,” such that if this option is ***selected*** “collateral ***web pages*** from the company’s Internet site 14 ***appear*** allowing the customer to have the product/service documentation e-mailed, faxed, or ***printed out*** for the customer lead 12, ***locally on demand***”; or to,
- ***“select to view a specific solution in action”*** 118,” such that if this option is ***selected*** “collateral ***web pages*** from the company’s Internet site 14 ***appear*** allowing the customer lead 12 to ***select*** which product or service the customer lead

12 would like to *view an online video clip of*; and furthermore, if the customer lead is interacting with the system in a tradeshow context, the system will give the customer lead an opportunity to,

- *"schedule an off-site meeting 120,"* such that if this option is *selected* the "the customer lead 12 is *connected* to Lotus Notes Calendar and the appropriate company representative 20 will be *automatically notified*, by e-mail or an *on-screen message alert*, of the customer lead's 12 desire to schedule a meeting"; and finally to,

- *respond to "a promotional offer from the company 22,"* such that if this option is *selected* "the appropriate representative 20 that deals in the *specified* goods or services is *automatically notified* by an e-mail message or *pop-up computer screen messages* via the lead management intranet 22."

3. Paragraph [0013] teaches the use of a real-time, interactive, web-based customer Lead Management form that company representatives can use in tandem with the Customer Needs/Feedback web form detailed previously. This paragraph states that the Lead Management web form is to be used while the company representative "is engaging a potential customer lead 12 in a conversation," and manifestly presupposes that any, and all, previously entered sales lead information will be made available to *retrieve or auto-populate this form in real time* indicated as follows:

- This paragraph states that when using the Lead Management web form to help a potential customer, the company representative 20 can "type in the person's name and *search* the lead management database 44 for their name." The paragraph goes on to state that if "the customer lead's 12 profile *appears*, then the seller or company representative 20 can talk intelligently about what goods/services *that the customer lead 12 indicated they*

*needed.*" The paragraph also states that if "the customer's lead profile *does not appear*, then the seller or company representative 20 can enter... the data needed for the Lead Management Form 24, 26."

- This paragraph further states that if "a Customer Needs/Feedback form 18 has been filled out completely, the company representative 20 will not have to enter any other type of information" (beyond the data which relates to the actual needs of a customer lead referred to in the paragraph as campaign, qualification, solutions, and follow-up information). This means that any of the customer contact information detailed in Paragraph [0030], which has been previously entered by a customer lead will be automatically retrieved and entered into the Lead Management web form.

4. Paragraph [0026] teaches that a customer lead's budget-authority-needs-timeframe BANT score 254 "is calculated in *real time* and *displayed immediately*" within the Lead Management web form.

5. Paragraph [0032] teaches that the final section of the customer lead management web form is also *auto-populated in real-time* for the company representative stated as follows: "The follow-up priority 356 is *automatically completed* based upon the BANT score 254 with one of the following options: hot business opportunity 358, very warm lead 360, warm lead 362, lukewarm lead 364, cold lead 366." The Lead Management web form also allows the company representative to enter a "misdirected lead" data flag to indicate that a customer lead has been misdirected, and should be redirected to an alternate group specified by the representative, the immediate result of which is that the "alternate group is notified by an *automatically generated e-mail notification or alert message*."

6. Paragraph [0034] reiterates the teaching of Paragraph [0013] as it relates to the dynamic real-time auto-population of the Lead Management web form stated as follows: "the information contained in the



lead management form 24, 26 ***automatically synchronizes*** with the ***information already in the lead management database 44*** and ***populates*** the form accordingly 32.” This paragraph further states that when some customer lead data is obtained from specified magnetic scanning devices, the “data from these scanning devices ***automatically synchronizes*** 32 with the data in the lead management database 44 and ***populates*** the lead management form 24, 26 ***in real time...***”

7. Paragraph [0035] reiterates the teaching of Paragraph [0026] as it relates to the ***real-time calculation and display*** of the customer lead’s BANT score generated from the Lead Management web form data capture options stated as follows: “After the customer lead 12 data capture options have been utilized, the data from each is merged together to create a complete lead or customer profile 32 which is stored in the lead management database 44. Lead priority is then calculated ***in real time*** by a BANT algorithm 36 that ***automatically calculates*** a BANT score ranking from 0 to 5.” (Note: once all required lead information has been entered, and the complete customer lead profile database record has been created, the BANT score is immediately calculated and displayed within the Lead Management web form as stated in Paragraph [0026].)

8. Paragraph [0036] teaches that the complete customer lead management system has been designed to employ a broad range of ***dynamic, web-based “push” technologies*** described and defined as follows: “A further aspect of the customer lead management system 10 is to provide global access and distribution of the customer lead data contained in the lead management database 44 via ‘push’ technology such as by automatic e-mail.” This paragraph specifically defines push technology as “computer or electronic based technology that ***automatically distributes information when a triggering event has occurred.***” The paragraph goes on to teach: “A user does not need to log in or connect to a server to check for updated or changed information. When the information has been updated, the server ***automatically notifies*** the user by ‘pushing’ the information out to the user.”

9. Finally, it should be noted that when the Applicant filed the original application of the Applicant's invention, page 2 and page 4 of the original application specifically referenced the use of an emerging web technology known as Lotus Domino web server (a/k/a "Lotus Domino GoWebserver"). At that time, this technology was designed for the principal and primary purpose of performing the specific type of computer-server-computer, simultaneous, data synchronization functions that distinguish the specification of the Applicant's real-time, web-based invention from all prior art in its use and teaching of ***dynamic and interactive*** intranet and internet web pages for the purpose of generating, capturing, and managing customer lead information.

Therefore, the Applicant respectfully submits that the above specification references do plainly, manifestly, and repeatedly demonstrate that the Applicant's invention in no way teaches a one-way or unidirectional use of the Internet to *statically gather or upload* customer sales lead data to a customer lead management database as is taught by the body of prior art cited by the Examiner, but rather teaches the ***dynamic and interactive*** use of intranet and internet web pages to ***immediately assess and respond*** to the business needs of customer sales leads ***in real-time***.

The rejection of claims 1-20 under 35 USC 102(a) as being clearly anticipated by Loro ("From Call Center Direct To Net") is believed to be overcome for at least the following reasons:

1. The amendments have been made to the independent claims 1, 12 and 16 which are believed to now fully distinguish from the Loro reference. More particularly, Loro does not include a sorting/ranking algorithm that determines recipient priority lead. This feature of the invention is set forth in the specification at various places, but the attention the Examiner has particularly called to FIG. 1, element 36, FIGS. 3A and 3B, and paragraphs [0006], [0021] through [0026], and [0036].
2. In addition, the use of dynamic, interactive, intranet and internet web pages in conjunction with real-time database population and

synchronization also is not taught by Loro because their system operates on the basis of telemarketers contacting customers, and through this technique qualifying the respective leads, but the Applicant's system instantly and electronically qualifies customer leads via the web.

The rejections of claims 1-20 under 35 U.S.C. 103(a) as being unpatentable over Melchione et al. in view of Woods et al. (Relationships Vital For High-Tech Marketers) is believed to be overcome for at least the following reasons:

1. The specified argument relating to the establishment of a customer lead priority utilizing a ranking algorithm is not taught by Melchione or the combination with Woods. Similarly, the means for distributing with dynamic, interactive, intranet and internet web pages in conjunction with real-time database population and synchronization, again, is not taught by Melchione. With regard to the sales lead distribution and follow-up process in particular, the real-time invention taught by the Applicant is dynamic, electronic, and instantaneous whereas the non-real-time system taught by Melchione is static, manual, and not instantaneous.

2. All aspects of customer needs feedback and lead management as taught by the Applicant's invention perform interactively and dynamically in real-time via the web through the use of front-end intranet and internet web forms and web pages that directly access a back-end web server database. In contrast, Melchione's system teaches the use of a computer network for the sole purpose of uploading customer lead data to a non-web-based database that in no way returns any type of sales related information in real-time to the local computer that was used to upload the customer lead data to the back-end database. This type of dynamic use of intranet and internet web pages for the purpose of responding to the needs of customer sales leads in real-time is not taught by any of the prior art referenced by the Examiner, was unique to the Applicant's invention at the time of its application, and at that time, offered several improvements to the process of generating, capturing, and managing customer sales

leads, including but not limited to, generating the potential for significantly shortened sales cycles.

3. The Applicant agrees that at that time, the use of the internet to *gather* customer lead data is taught by the prior art cited by the Examiner, and was also obvious to anyone of ordinary skill in the art of sales lead management. However, the use of the internet to dynamically and interactively *respond* to the needs and requests of customer leads by populating web-pages in real-time over an intranet or internet is in no way taught by the prior art, nor would it in any way have been obvious to a person of ordinary skill in the art of sales lead management. The required programming technology to perform these types of real-time, interactive, web-based functions did not, in fact, exist prior to the advent of Extensible Mark-up Language (XML), in mid to late 1997. It would, therefore, not have been readily apparent at that time that any type of existing sales lead ranking or scoring algorithm should naturally and obviously be generated, employed, or otherwise made use of through dynamic, interactive, intranet and internet web pages that act as a front-end customer interface populated by, and synchronized with, a sales lead web server database in real-time, as the Applicant's invention teaches, and which is lacking from Melchione, either alone or in the combination with Woods.

4. Melchione, Woods, or Aurum Software do not teach the use of *automatically generated* on-screen alerts or e-mail notifications for company representatives as taught by the Applicant's invention.

5. Melchione, Woods, or Aurum Software do not teach the use of Lotus Domino web server, Extensible Mark-up Language (XML), or any other real-time database synchronization technology which plainly distinguishes the specification of the Applicant's invention from all prior art, specifically with regard to its teaching of dynamic, interactive, intranet and internet web pages used to generate, capture, and manage customer lead information. The collective body of this prior art instead teaches a system that distributes captured sales lead information manually—whether in part, or in full—and with at least some degree of human intervention. In

contrast, the Applicant's invention distributes all sales lead information with no human intervention whatever.

6. The use of web-enabled hand-held electronic devices as taught by the Applicant's invention is not taught by Melchione, Woods, or Aurum Software.

The Applicant, further respectfully argues that the new rejection making claims 1 through 20 unpatentable under 35 U.S.C. 103(a) over Melchione in view of Woods, and further in view of Aurum Software is an accumulation of references which in itself proves that the current invention is unobvious for at least the following reasons:

1. First, how does one modify the teachings of Melchione with Woods and Aurum without having the combination suggested by Applicant's claimed invention? This flies in the face of Melchione in and of itself as not using a web-based mathematical calculation in real-time. The Woods teaching involves a human manually sending an e-mail, not a "push technology" system whereby an e-mail or other electronic alert or message is automatically generated and directed to the predetermined parties based on a mathematical formula that determines the content and recipient(s) of said message. It is submitted that to add the teachings of Aurum cannot overcome these deficiencies in Melchione and Woods, and actually flies in the face of even being compatible with the teachings of Melchione and/or Woods.

2. The Applicant has presented a further amendment to claims 1, 12, and 16 which are believed to more completely and very clearly distinguish from the new rejection set forth by the Examiner because the Aurum teaching is to utilize sales force automation software on the back-end to run the "WebTrak" on the front-end, and thus clearly Aurum is not an entirely web-based system.

3. The WebTrak module is not a dynamic system that reacts to a customer or company representative's input instantly. For example, it does not calculate how many dollars a customer might save if they bought a product the customer selects on the customer feedback form. WebTrak

does not display a list of products instantly after a customer inputs what he/she wants. WebTrak does not provide for an online appointment scheduler in which an interactive calendar displays allowing the customer to schedule an appointment to talk to a sales representative. WebTrak does not provide for the automatic generation of e-mail messages using push technology type web administrative software. WebTrak does not provide for the population of a web form's data fields with data from a customer profile record already in the database which is accomplished by the real-time database synchronization discussed in the Applicant's original specification. These examples plainly differentiate the Applicant's invention from the Aurum Software WebTrak Marketing Module.

The Applicant further, finally, and rigorously asserts that rejecting claims 1-20 under 35 U.S.C. 103(a) because "the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains," unquestionably overlooks the fact that *dynamic and interactive* use of intranet and internet web pages to *immediately assess and respond* to the business needs of customer sales leads *in real-time* through the use of *simultaneous database synchronization* technology as detailed in the Remarks herewith:

1. Is plainly, manifestly, and repeatedly taught within and throughout the original specification of Applicant's invention;
2. Is in no way taught by the collective body of prior art cited by the Examiner, nor should reasonably be construed or implied to be an obvious and natural use of said prior art;
3. Was in no way readily apparent to a person of ordinary skill in the art of customer sales lead database management at the time of the Applicant's invention, in that the very technologies required for, and employed by, the invention itself either did not exist, or had not been fully developed at the time of the collective body of prior art, and were in fact, yet emerging even at the time of Applicant's invention; and,

4. Was therefore, unique to the Applicant's invention at the time of its application, and at that time, offered several improvements to the process of generating, capturing, and managing customer sales leads, including but not limited to, generating the potential for significantly shortened sales cycles.

Every effort has been made to correct the oath/declaration, specification, and claim rejections detailed by the Examiner. Application has been carefully and thoroughly reviewed and minor amendatory corrections made to claims 1, 12, and 16 in response to the new rejection made by the Examiner, and are believed to clearly overcome the new rejection. It is respectfully believed that the application is now in condition for allowance, and action to that end is respectfully and earnestly submitted.

Respectfully submitted,

Date: 10/10/06

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Rachael Linette Cook, Inventor